Episode 4:

The Right Mix: Finding Your Family's Asset Allocation

StoryLens Podcast One-Sheet Snapshot

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In this episode, the StoryOne partners explore how families can approach asset allocation through the lens of stewardship. They unpack public markets, private equity, real estate, and venture capital; highlighting both opportunities and risks. The conversation offers practical wisdom for families who want a balance sheet that reflects their story and supports their legacy.



Featuring:
John Christensen
Cameron Bond
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Asset Allocation

- Risk, liquidity needs, long term goals and opportunity cost all need to be considered when evaluating asset allocation.
- Proper allocation across private markets, including private real estate, private equity, and venture capital, as well as public markets such as stocks, ETFs, mutual funds, and bonds, is essential.

Asset Location

- Where funds are invested also needs to be considered: taxable accounts, qualified accounts (Roth, IRA, 401k, etc.) and non-profits all have different tax treatment.
- Tax efficiency and liquidity of the investment need to align.
- Family decisions should support shared goals and avoid losing money that could be used for giving or legacy projects.

Investing with Purpose

- True wealth is measured not only in growth but in alignment with values.
- Asset allocation becomes a tool to reinforce purpose, stewardship and impact across generations.

The Role of Liquidity

- Liquidity often goes unnoticed until it's needed; without it, flexibility disappears.
- Families must keep enough accessible capital to weather challenges and seize opportunities.

Understanding the Landscape

- Families today face a mix of asset classes, such as public markets, real estate, private equity and venture capital. Each have unique opportunities and risks.
- Asset allocation is not about prediction but positioning: stewarding resources wisely across the portfolio.

Notable Quotes

"A lot of times you don't know what liquidity is until you don't have it and you need it."
-John Christensen

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